

			NO TEMP REQUESTED	TONY DEWAYNE MARSH , Nephew, is Petitioner and request appointment as Co-Conservator of the Person with medical consent powers under Probate Code §2355 (joint with current conservator MAXINE MARSH).	MAXINE MARSH , Sister, was appointed Successor Conservator with medical consent powers on 7-15-03.	Petitioner states this petition is brought with the knowledge, consent and approval of Maxine Marsh in the event of inability of Maxine Marsh to continue in the future due to her increasing age and physical condition, and to aid in continuity of care of the Conservatee in the future such that care is not delayed or absent due to lack of an individual in the position of conservator. Consent by Maxine Marsh for Petitioner to Act as Joint Conservator was filed 10-30-14. Petitioner also requests the Court take judicial notice of various prior orders in this matter.	Court Investigator Julie Negrete filed a report on 12-9-14.
	Aff.Sub.Wit.						
✓	Verified						
	Inventory						
	PTC						
	Not.Cred.						
✓	Notice of Hrg	w					
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	Aff.Pub.						
	Sp.Ntc.						
	Pers.Serv.						
✓	Conf. Screen						
✓	Letters						
✓	Duties/Supp						
	Objections						
✓	Video Receipt						
	CI Report						
	9202						
✓	Order						
	Aff. Posting						
	Status Rpt						
	UCCJEA						
	Citation						
	FTB Notice						

NEEDS/PROBLEMS/COMMENTS:	
<u>Court Investigator advised rights on 11-24-14</u>	
<u>Voting rights affected – need minute order</u>	
Note: DARLINE FRAME, CAROLYN ROMANENKO, and ALINE WHITE , Sisters, filed a petition for appointment as successor co-conservators on 11-12-14 which was set for hearing 12-15-14.	
Court Investigator to advise rights, file report.	
Voting rights affected – need minute order	
1. The Conservatee is developmentally disabled pursuant to Probate Code §1420. Therefore, need notice to CVRC pursuant to Probate Code §§ 1822(e), 1461.4.	
Reviewed by: skc	
Reviewed on: 12-8-14	
Updates: 12-10-14, 12-15-14	
Recommendation:	
File 1 - Humphries	

Atty Perez, Holley H., of Perez, Williams, Medina & Rodriguez (for Petitioner Susan K. Medina)

(1) First and Final Report of Executor, (2) Waiver of Accounting and (3) Petition for Distribution

DOD: 2/25/2011		SUSAN K. MEDINA , daughter and Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Costs of Administration listed in Paragraph 15 of the <i>Petition</i> includes request for the following costs, which appear to be inappropriate charges to be paid from the estate: <ul style="list-style-type: none"> • \$350.00 on 6/20/2012 for payment to Fresno Bee for publication; proper publication was subsequently made in the Sanger Herald, with payment on 7/10/2012 of \$468.00; therefore, the former publication fee of \$350.00 appears inappropriately charged to the estate in addition to the latter publication fee. • \$321.00 on 3/27/2014 for appraisement of New Mexico real property; the New Mexico real property is inappropriately included in the California administration of this Decedent's estate. <p align="center">~Please see additional page~</p>
		Accounting is waived.	
Cont. from		I & A — \$173,000.00	
<input type="checkbox"/>	Aff.Sub.Wit.	POH — \$173,000.00 (no cash)	
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory	Executor — waives	
<input checked="" type="checkbox"/>	PTC	Attorney — \$1,435.00 (less than \$6,190.00 statutory fee, pursuant to agreement between Petitioner and Petitioner's attorney)	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Costs — \$1,762.00 (filing fee, probate referee, publication, certified copies, recording fees)	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	Distribution pursuant to Decedent's Will is to:	
	Conf. Screen	<ul style="list-style-type: none"> • ALBERT J. MEDINA – 25% interest in real property in Sanger [and 25% interest in real property in New Mexico?] • RICHARD E. MEDINA – 25% interest in real property in Sanger [and 25% interest in real property in New Mexico?] • DAVID M. MEDINA – 25% interest in real property [and 25% interest in real property in New Mexico?] • SUSAN K. MEDINA – 25% interest in real property [and 25% interest in real property in New Mexico?] 	
	Letters 081412		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: LEG	
		Reviewed on: 12/10/14	
		Updates:	
		Recommendation:	
		File 2 - Medina	

NEEDS/PROBLEMS/COMMENTS, continued:

2. Paragraph 8 of the *Petition* states that a *Final Inventory and Appraisal* was filed on 4/11/2014 showing the value of real property in New Mexico to be **\$3,000.00**, and that a second *Final Inventory and Appraisal* was filed on 6/2/2014 omitting the value of the New Mexico real property, therefore the total value of the appraised value of the estate in California is **\$173,000.00** [rather than **\$176,000.00**.] Petitioner's proposed order finds in Paragraph 6 that Petitioner will be authorized to execute a deed conveying the New Mexico real property. *Petition* and proposed order are inconsistent in that the *Petition* indicates that the New Mexico real property is not an inventoried asset of this estate; however, Petitioner submits a proposed order finding that the Court authorizes distribution of the New Mexico real property from this estate.

3. Paragraph 18 of the *Petition* states with regard to Decedent's New Mexico real property asset that New Mexico follows the Uniform Probate Code, pursuant to which the Petitioner filed in the Valencia County Probate Court in New Mexico a *STATEMENT OF DOMICILIARY FOREIGN PERSONAL REPRESENTATIVE*, with authenticated copies of this Court's order appointing Petitioner as Executor and the Letters of Administration. *Petition* states that this enables Petitioner with an order of distribution from this Court to convey the New Mexico real property as specified in the Decedent's Will. Therefore, Petitioner seeks authorization to execute a deed conveying the real property located in New Mexico to Albert J. Medina, Richard E. Medina, David M. Medina, and Susan K. Medina at **25%** interest to each. The following defects are noted in relation to this request:
 - **A file-stamped copy of the *STATEMENT OF DOMICILIARY FOREIGN PERSONAL REPRESENTATIVE*** that Petitioner states was filed in the Valencia County Probate Court New Mexico should be filed in this proceeding.
 - **Petitioner does not provide the Court with authority** regarding the New Mexico ancillary procedure to support Petitioner's request that this Court authorize conveyance of the New Mexico real property from this estate administration such that this Court's order will be effective to distribute property outside this Court's jurisdiction. The following secondary source material is referenced with respect to the jurisdiction and ancillary administration issues relating to the Decedent's New Mexico real property asset, in an effort to ensure proper administration of the Decedent's estate:

California Practice Guide: Probate, Bruce S. Ross and Jeryll S. Cohen. Chapter 14. Special Problems In Probate Administration.

F. Ancillary Administration

6. **[14:402] California Representative's Responsibilities re Foreign Assets:** If a California decedent left personal property in another jurisdiction, the California estate representative may be able to obtain delivery for administration in the California probate (e.g., under the other state's counterpart to Probate Code § 12570 summary collection.). Otherwise, however, and in all cases of out-of-state realty, an ancillary proceeding in another jurisdiction may have to be commenced (unless the other state has a summary distribution procedure for real property [emphasis added].)

a. Authority over out-of-state property

(1) [14:403] Authority limited to California property: An estate representative's authority extends no further than the jurisdiction where his or her letters issued. [CCP § 1913(b); *Smith v. Cimmet* (2011) 199 CA4th 1381, 1392–1393, 132 CR3d 276, 284 [further citations omitted].] Accordingly, California representatives have no authority over property in other states; they are required to account for, “preserve” and “manage” foreign assets only if and when those assets are delivered to California and thus become subject to a California administration. [*Estate of Barreiro* (1932) 125 CA 752, 767, 14 P2d 786, 792.]

(1) First and Second and Final Account and Report of Co-Conservators of the Estate and (2) Petition for Attorney's Fees to Co-Conservators' Attorney (3) Attorney's Fees to Conservatee's Attorney (4) For Withdrawal of Funds from Blocked Account (5) Delivery of Assets and (6) Discharge of Co-Conservators

		<p>JAMES VANCE SEVERIN and TERI LYN SEVERIN, Temporary Co-Conservators of the Estate without bond, are Petitioners.</p> <p>Account period: 10-2-12 through 1-7-13 Accounting: \$ 16,091.11 Beginning POH: \$ 0.00 Ending POH: \$ 369.42</p> <p>Account period 1-7-13 through 10-8-14 Accounting: \$142,764.13 Beginning POH: \$ 75,000.00 Ending POH: \$ 38,797.42</p> <p>Attorney Janet Wright: \$11,000.00 plus \$599.99 in costs (Attorney Wright was court appointed to represent the interests of the Conservatee and performed legal services in excess of \$21,000.00, but is only requesting \$11,000.00 plus \$599.99 in costs.)</p> <p>Attorney G.L. Motzenbocker: \$12,490.50 (For services and costs in excess of 41 hours Per Exhibit D.)</p> <p>Co-Conservators: Waived</p> <p>Petitioners state The Conservatee and his wife have back taxes due and payable plus interest and penalties to the IRS and the FTB for tax years 2009-2013, estimated at over \$29,000.00 per Exhibit B. Petitioners request that after payment of the attorneys' fees and costs, the remaining balance be distributed to the IRS.</p> <p style="text-align: center;">SEE ADDITIONAL PAGES</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need account statements pursuant to Probate Code §2620(c).</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
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	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
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	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	2620(c)			x
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 12-11-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3 - Salzman</p>	

Page 2

Petitioners state: Petitioners were appointed to be the receiver of a retirement benefit of approx. \$4,000/month for the benefit of the Conservatee. Petitioners received those retirement payments from 10-2-12 through 1-7-13. All funds were used for living expenses for the benefit of the Conservatee. A separate "conservatorship" account was not set up, as the retirement payments were made as automatic deposits to the specified account, as well as an automatic payment that was taken out of the same account for a loan held by the Conservatee. Petitioner were simply added to Mr. Salzman's existing account with the Fresno County Federal Credit Union and managed the retirement benefit payments out of this account, as it was for a short, temporary time. Account statements to be filed under separate cover.

On 1-7-13, the Court revised the powers of the temporary co-conservators and ordered limited powers to negotiate and settle with the Conservatee's creditors including the California Franchise Tax Board and the IRS, to handle all matters related to the sale of the Conservatee's residence in Fresno, with proceeds to be placed into a blocked account, and to continue to have the power to negotiate and sign leases or rental contracts for the purpose of obtaining a residence for the Conservatee.

The real property was sold 4-18-14 and funds were deposited into a blocked account at Bank of America. A receipt filed 6-20-14, and an amended receipt showing the new account number assigned by the bank is filed concurrently with this account.

Petitioners state they have fulfilled their duties in such capacity as the real property has been sold and there is no need for a continuation of the temporary conservatorship proceedings.

During the temporary conservatorship, Attorney Janet Wright was court appointed to represent the interests of the Conservatee. Ms. Wright performed legal services in excess of \$21,000.00, but is only requesting \$11,000.00 in fees, plus \$599.99 in costs. See Declaration at Exhibit C.

Petitioners request that:

- 1. Notice of hearing on this account, report and petition be given as required by law;**
- 2. The Court make an order approving, allowing and settling the account and report of the conservator in all respects as filed;**
- 3. The Court authorize payment of \$11,599.00 to Janet Wright as attorney for the Conservatee for legal services and costs provided during this account period;**
- 4. The Court authorize payment of \$12,490.50 to G.L. Motsenbocker as attorney for Petitioners for legal services and costs provided to the conservatorship during the period of this accounting;**
- 5. The Court authorize and direct Bank of America to deliver the property remaining in the blocked savings account as follows:**
 - Janet L. Wright: \$11,599.00**
 - G.L. Motsenbocker: \$12,490.50**
 - US Treasury: Remaining balance of \$14,707.92 plus any interest accrued**
- 6. Upon the filing of proper receipts, the temporary conservators be discharged from any further liability; and**
- 7. Other relief be granted that the Court considers proper.**

DOD: 08/14/11		MALER ALI TAREB, son, was appointed as Administrator on 07/03/13. Letters of Administration were issued on 07/03/13.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 09/23/14</u> 1. Need Account/Report of Administrator and Petition for Final Distribution.
		Final Inventory & Appraisal filed 07/15/13 - \$85,000.00	
Cont. from 090514, 092314			
	Aff.Sub.Wit.	Status Report filed 12/16/14 states: the sole asset of the estate is real property located on S. Winery in Fresno. The Administrator has been working with Wells Fargo Bank on adjusting the loan amount secured by the real property in order to allow a sale of the property in an amount that would benefit the estate. However, discussions in this matter and the amount of documentation provided to Wells Fargo have been more extensive than anticipated, although it is expected that their approval will be forthcoming shortly. A 60 day continuance is requested.	
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	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
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	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
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	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Order to Show Cause

DOD: 08/14/11	MALER ALI TAREB , son, was appointed as Administrator on 07/03/13. Letters of Administration were issued on 07/03/13.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 092314	Final Inventory & Appraisal filed 07/15/13 - \$85,000.00	<u>CONTINUED FROM 09/23/14</u> Minute Order from 09/23/14 states: Mr. Bagdasarian apologizes for not appearing at the last hearing and explains it was a scheduling issue.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/09/14
		Updates:
		Recommendation:
		File 4B - Tareb

DOD: 10-7-12	JOAN ST. LOUIS , Spouse, filed Petition for Assumption of Law Practice of David St. Louis on 9-6-13.	NEEDS/PROBLEMS/COMMENTS: Note: First Account of Iolfa Trust Funds by Court-Appointed Practice Administrator and Status Report filed 10-30-14 is Page B. This Status Hearing remains on calendar as it was continued by the Court.
Cont. from 111313, 112013, 010814, 022614, 052814, 062514, 092214, 110314	Background: Mrs. St. Louis' petition requested: 1) That the Court assume jurisdiction over the law practice of David J. St. Louis and appoint attorney PAUL T. CHAMBERS to represent and assist the Court in assuming jurisdiction; 2) Allow Mr. Chambers to appoint himself as receiver and take possession and control of any and all bank accounts related to Mr. St. Louis' law practice, including the attorney-client trust account which contained \$54,502.09 at 3-31-13; 3) Coordinate with Allison St. Louis, former legal secretary, to determine the clients entitled to funds and the amounts each is owed; 4) Upon determining the recipients and the amounts owed, that Mr. Chambers be allowed to issue checks to the recipients without further court order; 5) Specifically, that Mr. Chambers be allowed, without further Court order, to issue checks from a certain estate account (John K. Shirin Estate) to those recipients entitled thereto; and 6) Upon completion, provided accounting.	
Aff.Sub.Wit.		Reviewed by: skc Reviewed on: 12-10-14 Updates: Recommendation: File 5A – St. Louis
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	<p>Non-Opposition to Petition was filed 9-30-13 by the State Bar of California.</p> <p>A Creditor's Claim and Request for Special Notice was filed 9-30-13 by Attorney J. Patrick Sullivan, who represents Walter Wentz, Creditor.</p> <p>Limited Opposition to Petition was filed 10-9-13 by BIANCA SORIA. Ms. Soria states she was a client of Mr. St. Louis, who was wired \$65,000.00 in connection with a settlement. Ms. Soria requested that as a condition to granting the petition, that the Court direct Mr. Chambers to distribute the funds to her, or to post appropriate bond.</p> <p>At hearing on 10-16-13, the Court granted the petition with additional orders and set this status hearing. See Page 2 for specifics.</p> <p>Subsequent to the hearing, both attorneys David Roberts and Donald Cram submitted competing proposed orders.</p> <p>Therefore, the Court was to address the competing proposed orders at this status hearing on 11-13-13.</p> <p style="text-align: center;">SEE ADDITIONAL PAGES</p>	

Page 2

Minute Order 10-16-13: Mr. Cram is appearing via CourtCall on behalf of Bianca Soria. The Court accepts Mr. Roberts representation that Attorney Timothy Magill has been given notice. The Court finds that Patrick James' client has been properly served. The Court will allow the interlineation under 9764. The Court grants the petition and waives bond. The Court orders that the \$41,155.89 be paid within 30 days. The Court notes that there are no funds to pay Attorney Chambers and he is acting in pro bono. Matter set for Status Hearing on 11/13/13. If everything is completed by 11/13/13, no appearances will be necessary. Set on 11/13/13 at 9am in Dept 303 for Status Hearing. Additional hearing dates 3/6/14 at 9am Dept 303 for Status Re Accounting; Petition is granted; Order to be signed ex parte.

Attorney David A. Roberts submitted a proposed Order that contains orders as follows:

1. Granting the petition that the Court assume jurisdiction over the law practice, including, but not limited to, dispersing [sic] funds held in the attorney-client trust account;
2. Appointing Paul T. Chambers to represent and assist the Court in assuming jurisdiction over the law practice without bond and shall receive no compensation;
3. That Mr. Chambers coordinate with Allison St. Louis to determine the clients entitled to files, documentation, and/or funds and the amounts each is owed;
4. That the amount that Mr. Chambers finds due to Ms. Soria shall be paid within 30 days from the entry of this order without further Court order;
5. That Mr. Chambers be allowed to appoint himself receiver and take possession of the various accounts and have signature power over such accounts, including that certain account fbo John K. Shirin or his heirs;
6. That after determining the recipients of the files, documents, and money, and the amount thereof, that Mr. Chambers is given the authority to disburse such without further Court order;
7. That Mr. Chambers is authorized without further Court order to issue checks from the John K. Shirin account to those recipients entitled thereto;
8. That upon completing the foregoing tasks, Mr. Chambers provide an accounting, upon approval of which he shall be discharged; and
9. That Mr. Chambers inform the Court of any other action taken as the Court's representative;
10. Setting hearing for approval of the final account on 3-6-14.

Attorney Donald H. Cram submitted an Alternate proposed Order that includes, in addition to the above orders, that Mr. Chambers shall disburse no less than \$41,155.89 to Ms. Soria within 30 days without further Court order.

Note: Per Minute Order 2-26-14, bond of \$47,000.00 was required. Bond was filed 3-17-14. No further status report or accounting has been filed.

Note: The Court had originally set status hearing for 3-6-14 for the filing of the accounting. On 3-6-14, that status hearing was continued with this status hearing. See Page B.

Note: The Order for Court Assumption of the Law Practice of David J. St. Louis, Deceased, and Appointing Paul T. Chambers Practice Administrator with Related Powers of Administration was signed on 3-26-14. An Amended Order was signed by the Court 5-14-14, which included specific distribution relative to the Shirin Estate.

Note: The amended order was apparently submitted to the Court for signature ex parte without petition. \$60.00 is due for the amended order.

DOD: 10-7-12		<p>PAUL T. CHAMBERS, Practice Administrator with bond of \$47,000.00, is Petitioner and states:</p> <p>Account period: 10-7-12 through 10-14-14</p> <p>David J. St. Louis, a member of the State Bar of California, passed away leaving unfinished client matters including funds in his attorney-client trust accounts.</p> <p>Pursuant to the Order for court Assumption of the Law Practice of David J. St. Louis, Petitioner was authorized to, among other things, take possession and control of any and all bank and/or financial accounts relating to David J. St. Louis' law practice, including, but not limited to, general or office accounts, and the client trust accounts. In addition, he was authorized to have signature powers on all such accounts, including the attorney-client trust account of David J. St. Louis held by Bank of the West Acct #xxx9178 and the account held by David J. St. Louis at Fresno First Bank for the benefit of John K. Shirin or his heirs #xxx9000.</p> <p>To Mr. Chambers' knowledge, two attorney-client trust accounts existed at Mr. St. Louis' death – Bank of the West Acct #xxx9178 entitled "David J. St. Louis Inc. Trust Funds – California State Bar Account" and Acct #xxx9000 at Fresno First Bank entitled "Estate of John K. Shirin."</p> <p>Attached as Exhibit A is an accounting of the deposits and disbursements, including the current balances covering the period 10-7-12 through 10-20-14.</p> <p align="center"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Need verification of Practice Administrator Paul Chambers. An attorney cannot verify on behalf of a fiduciary. Probate Code §1023. This petition is titled First Account and Status Report, which indicates that further administration and account is still necessary. However, Petitioner requests authorization to make payments such that the balance on the accounts is zero. Need clarification. Is this a first and final account? If further account is needed, the Court may set a status hearing for its filing. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing pursuant to Request for Special Notice filed 9-30-13 and Probate Code §1252 on: - Walter Wentz -J. Patrick Sullivan
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified <input checked="" type="checkbox"/>		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail <input checked="" type="checkbox"/>		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Petitioner states the Estate of John Shirin account was an account set up pursuant to the Judgment filed 12-15-10. Pursuant to the terms of the Judgment, the entire balance in the Trust Account was distributed to Bruce Bickel, Trustee, on 10-14-14.

The David J. St. Louis Inc. Attorney0Client Trust Fund Account has a deficit in the amount of \$3,290.43. Mr. Chambers has searched diligently and worked closely with Mr. St. Louis' legal secretary and bookkeeper, but has been unable to discover how the deficit occurred.

Pursuant to B&P Code §6185(a)(5), Mr. St. Louis' spouse, Joan St. Louis, as the personal representative of the Estate of David J. St. Louis, has deposited \$3,290.43 into the trust account to enable Mr. Chambers, upon Court approval and order, to make payment to the persons entitled thereto, and accordingly, the trust funds will be disbursed as follows:

Bianca Soria: \$2,437.17
Christina Fierro: \$6,862.48
McGuire Physical Therapy: \$997.99
San Joaquin Accident & Med. Group: \$2,634.15
The Phia Group: \$48.51
Grant/Mercantile (Community Hospital): \$81.82
Lynn Nelson: \$1,720.00
Walter Wentz: \$121.13

See Declaration of David A. Roberts filed 10-30-14 for details regarding the above amounts.

Mr. Chambers and Mr. Roberts are currently working with Mr. Tim Magill with regard to cases taken over by Mr. Magill upon the death of Mr. St. Louis (B&P Code §6185(a)(2), and the division of fees for work in process on pending cases (B&P Code §6185(a)(2).

Petitioners pray that all of his acts and transactions as reflected in this account and report be ratified, confirmed and approved, and that upon Court approval and order, Mr. Chambers be authorized to make payments to the individuals in the amounts set forth in Paragraph 8 above.

6 2013 Walter Edward Eastwood Revocable Trust Case No.14CEPR00069**Atty LeVan, Nancy J. (for Susan Brown -****Probate Status Hearing RE: Filing Final Accounting**

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> First and Final Account was settled on 1-28-14. This appears to have been calendared in error.	
DOD:			
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
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Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
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Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: JF			
Reviewed on: 12/09/14			
Updates:			
Recommendation:			
File 6 - Eastwood			

**Petition for Probate of Will and for Letters of Administration with Will Annexed;
Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

DOD: 07/13/2014		PUBLIC ADMINISTRATOR , is petitioner and requests appointment as Administrator with Will Annexed without bond. Letters of Special Administration shall expire on 12/16/2014. Full IAEA – o.k. Will dated: 07/26/2006 Residence: Fresno Publication: The Business Journal <u>Estimated value of the Estate:</u> Personal property - \$31,000.00 Real property - \$206,000.00 Total - \$237,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: 1. Need Proof of Holographic Will. Note: Proof of Holographic Will filed 09/08/2014 states decedent's California driver's license is in the Deputy's possession and it matches the signature on her will. A copy of the driver's license is attached. Note: Final Inventory and Appraisal filed 10/02/2014 with an estate valued at \$491,736.94 therefore status hearing for the filing of the Inventory and Appraisal was not set. Note: If the petition is granted status hearings will be set as follows: • Tuesday, 02/16/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from 090214, 102114			
✓	Proof of Hol. Instrument		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w/		
✓	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
	Duties/Supp n/a		
	Objections		
	Video Receipt		
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	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: LV
Reviewed on: 12/09/2014
Updates:
Recommendation:
File 7 - Paregian

Co-Trustee's First Account and Petition for its approval; for Approval and Allowance of Trustees' and Attorney's Fees and Costs and for Surcharge of Litigation Fees and Costs

Albert H. Brown DOD: 6-23-11	GLEN A. BROWN and PAMELA J. BOLIN, Co-Trustees, are Petitioners.	NEEDS/PROBLEMS/ COMMENTS:
Tinnie Lee Brown DOD: May 2008	Account period: 6-23-11 through 6-30-14 Accounting: \$436,061.28 Beginning POH: \$432,652.20 Ending POH: \$187,557.01 (\$6,057.01 cash plus residential real property on Sylmar in Clovis, Fresno County, unimproved real property in Shasta County, and personal property items)	
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Citation		
FTB Notice		
Co-Trustee Glen A. Brown: \$1,143.62 (\$1,500.00 less \$356.38 returned)		
Co-Trustee Pamela J. Bolin: \$1,307.00 In light of the \$432,652.20 value of the assets at commencement of administration, Petitioners believes the total trustee fees of approx. 0.6% of the total value are reasonable and ask that the Court approve the payment of these fees.		
Barrus and Roberts, PC: \$1,970.00 (paid during account period) plus \$5,252.10 plus \$435.00 filing. Petitioners request the Court approve payment of the fees paid, plus the additional fees and costs as well as additional fees and costs incurred after 10-31-14 as billed to Petitioners. See Exhibit 2.		
Petitioners state: Distributions were made as follows: \$2,500 each to eight of the trustors' grandchildren, \$60,000 each to Kathy Short and Dennis Brown, and \$62,000 to Glen A. Brown; however, Petitioners agree that Glen A. Brown shall return the excess distribution of \$2,000 to the trust. Distributions to the two remaining children of the trustors, Pamela J. Bolin and Anita Payne, have been agreed by them to consist of the proceeds from the sale of the residence. The personal property items are to be distributed per the co-trustees' discretion. The remaining cash is to be used partially for repairs to the residence and remaining trust administration expenses.		
SEE ADDITIONAL PAGES		
		Reviewed by: skc
		Reviewed on: 12-9-14
		Updates: 12-12-14
		Recommendation:
		File 8B - Brown

Page 2

Petitioners state on 8-23-13, Pamela J. Bolin, as Co-Trustee and with the prior knowledge and agreement of beneficiary Anita Payne, obtained a loan for \$30,000 from Ord Finance to pay what was inadvertently miscalculated as a deficiency in the total trust payment to beneficiary Glen A. Brown and to provide funds for repair of the roof at the Sylmar residence. Funds were distributed \$12,000 to Glen A. Brown (\$6,000 as a personal loan and \$6,000 on the mistaken belief that the trust still owed him \$6,000), \$3,000 to the trust checking account to pay for roof repairs, which still remain to be made, and the remaining \$15,000 retained by Pamela J. Bolin as an advance against her share of the net proceeds of the sale of the residence. Accordingly, in addition to the \$2,000, Glen A. Brown owes \$12,000 to Pamela J. Bolin in repayment of this amount.

Despite borrowing the money on behalf of the trust, Pamela J. Bolin and Anita Payne have agreed to personally pay all amounts owed under the note. During the remainder of 2013, Pamela J. Bolin paid \$175/month on the loan balance and Anita Payne paid \$125/month. During 2014, Pamela J. Bolin has made all of the \$300 monthly payments owed on the loan. Petitioners anticipate that upon the sale of the residence, all of the financial arrangements related to the residence will be equalized so that Pamela J. Bolin and Anita Payne receive equal trust distributions from the proceeds.

Unlawful Detainer Action filed against Deborah Payne: Petitioners state Deborah Payne, daughter of Anita Payne, was and is currently living in the residence and refuses to vacate the premises. Although the residence has been listed for sale, Deborah Payne has not only failed to maintain the residence in a condition to be shown to buyers, but has interfered with and effectively made impossible the showing of the residence to potential buyers. Accordingly, an unlawful detainer action was initiated as **14CECL07612**, which is not yet resolved. Petitioners request the cost of this action, including attorney fees and costs be charged as a surcharge against Anita Payne's share. The surcharge funds shall reimburse the trust for funds expended for the action and funds advanced by others shall be reimbursed to them with the remainder of the surcharge.

Petitioners pray for an order as follows:

1. Settling and allowing the account and report and approving and confirming the acts of Petitioners for the accounting period of 6-23-11 through 6-30-14;
2. Approving the payments made from the Trust for Trustees' fees in the amount of \$1,143.62 to Glen A. Brown and \$1,307.00 to Pamela J. Bolin;
3. Approving the attorneys' fees and costs of \$1,970.00 paid to Barrus and Roberts, PC, during the account period and the payment of \$5,687.10 to Gregory J. Roberts, representing additional attorney's fees and costs incurred and unpaid through 10-31-14, and the filing fee for the petition, and payment of fees and costs incurred hereafter;
4. Authorizing Petitioners to apply as a surcharge against the estate of Anita Payne in the Trust assets the fees and costs paid by the Trust to pursue and resolve the unlawful detainer action against Deborah Payne, as evidenced by attorney's bills and trust payments; and
5. For such other orders as the Court may deem proper.

SEE ADDITIONAL PAGES

Page 3

Objection filed 12-12-14 by Anita Payne states the account should not be settled or approved, the requested compensation should not be approved, and the surcharge for litigation fees and costs should not be allowed on the following grounds:

- The schedules supporting the accounting are incomplete and describe transactions not readily understandable without further detail and therefore should be amended as more specifically requested below.
- The accounting shows several problems within administration that violate the Probate Code and the Co-Trustees should be surcharged accordingly.
- Based on the inadequate job of the Co-Trustees and the lack of benefit received by the trust for their actions and inactions, the Co-Trustees should receive no compensation.
- The petition for surcharge is not chargeable against Objector as she was not a party to that action. Furthermore, any issue regarding costs and fees for that matter were settled within the eviction action.

Objector specifically references division of the personal property as inadequate, and states the accounting needs to identify the property distributed, the recipients, and the value. Objector states there were no interest payments on the account in 2012. The account should include interest or provide an explanation as to why none was earned. Objector requests further explanation regarding specific disbursements as set forth in the petition. Objector states the accounting shows several discrepancies that violate the Probate Code.

Objector states the Co-Trustees used loan funds for their own benefit. \$30,000 was borrowed for roof repair, yet only \$3,000 was paid to the trust, and the roof was never repaired. The remaining \$27,000 was taken by the Co-Trustees as either an unnecessary payoff (to Glen Brown), a loan (to Glen Brown), or an advance (to Pamela Bolin). To make matters worse, Objector was asked to help make payments on the loan under the pretense that it was benefiting her because she was a partial owner of the house. Objector paid \$625.00 toward loan premiums and had provided additional checks to Pamela Bolin that were not cashed. The Co-Trustees now claim the house was still solely a trust asset, Glen Brown was not entitled to additional funds and had already been given an extra \$2,000.00, and the roof was not repaired. Thus Anita Payne paid \$625.00 to loan money to the Co-Trustees and the trust account.

Objector states the terms of the loan are unintelligible. The loan funds were clearly misused. The Co-Trustees should be surcharged \$625.00 payable to Objector, and they should also be surcharged for the amount of money they received from the loan \$27,000.00, plus interest the trust would have earned off the loan had it been properly deposited. Objector alleges breach of duty of impartiality when they made distributions to themselves and other beneficiaries but not Objector. See description in Objection. Objector states the trustees have not earned a fee due to their mismanagement, and there is no legal or equitable basis to surcharge Objector for the unlawful detainer action.

Objector requests:

1. The Petitioners' request for approval of the First Account be denied;
2. The Petitioners' request for approval and allowance of trustees' fees be denied;
3. The Petitioners' request to surcharge Objector for litigation fees and costs be denied;
4. The Petitioners be surcharged in the amount of \$34,575.62 (as set forth in the petition), \$33,950.62 going to the trust and \$625 going to Objector in reimbursement for her payments on the loan, as well as interest lost by the trust due to the failure of properly deposit trust funds;
5. That the First Account be amended to correct the insufficiencies described herein; and
6. Such other and further relief as the Court may deem proper.

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
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Video Receipt		
CI Report		
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Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Continued to 01/20/15 Per request of counsel
		Reviewed by:
		Reviewed on: 12/09/14
		Updates:
		Recommendation:
		File 9 - Caudle

DOD: 07/22/13		KATHLYEEN M. WYNN and LISA ROYCE , trustees of THE MORSE TRUST, dated 03/03/06, are Petitioners. 40 days since DOD. No other proceedings. I & A - \$140,000.00 Will dated 03/03/06 devises estate to The Morse Trust. Petitioners request Court determination that decedent's 100% interest in real property located 260 Meadow Lane, Kingsburg, CA pass to them as trustees of THE MORSE TRUST dated 03/03/06 pursuant to decedent's will.	NEEDS/PROBLEMS/COMMENTS: 1. This matter was filed using a fee waiver. Filing fees are considered costs of administration and must be paid prior to distribution of any assets. Therefore filing fees totaling \$435.00 are now due.
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		Reviewed by: JF Reviewed on: 12/09/14 Updates: Recommendation: File 10 - Morse	

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 08/30/96		CARMEN C. MORENO, daughter/named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Full IAEA – OK	1. The Petition states that Edward Moreno, decedent's grandson, is deceased. Need date of death pursuant to Local Rule 7.1.1 D.
Cont. from		Will dated 02/27/90	2. Need Order and Letters.
	Aff.Sub.Wit. s/p		
✓	Verified	Residence: Fresno Publication: The Business Journal	
	Inventory		
	PTC	<u>Estimated Value of the Estate:</u> Real property - \$16,500.00	
	Not.Cred.		
✓	Notice of Hrg	Probate Referee: RICK SMITH	
✓	Aff.Mail w/		
✓	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters x		
✓	Duties/Supp		
	Objections		
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	Order x		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: JF
			Reviewed on: 12/09/14
			Updates:
			Recommendation:
			File 11 - Moreno

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 09/24/14		ALLEN DUDLEY , son/named alternate Executor without bond, is Petitioner. Full IAEA – OK Will dated – 04/10/13 Residence: Fresno Publication: The Business Journal <u>Estimated Value of the Estate:</u> Personal property - \$195,000.00 Annual income - 1,000.00 Total - \$196,000.00 Probate Referee: RICK SMITH	NEEDS/PROBLEMS/COMMENTS:
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		Reviewed by: JF	
		Reviewed on: 12/09/14	
		Updates:	
		Recommendation: SUBMITTED	
		File 12 - Dudley	

Age: 81 years Cont. from <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%;"></td> <td style="width: 85%;">Aff.Sub.Wit.</td> <td style="width: 10%;"></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Aff.Mail</td> <td style="text-align: center;">W/</td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Letters</td> <td></td> </tr> <tr> <td></td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>		Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.		✓	Notice of Hrg		✓	Aff.Mail	W/		Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen		✓	Letters			Duties/Supp			Objections			Video Receipt		✓	CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA		✓	Citation			FTB Notice		<p style="text-align: center;">TEMPORARY EXPIRES 12/16/14</p> <p>PUBLIC GUARDIAN is petitioner and requests appointment as conservator of the person with medical consent and dementia powers and of the estate.</p> <p>Declaration of Stephen Grossman, M.D., 10/14/14.</p> <p>Estimated value of the estate: Annual Income - \$11,340.00 Real property - \$82,000.00</p> <p>Voting Rights Affected.</p> <p>Petitioner states Mr. Davis has been diagnosed with dementia. In addition he requires daily dialysis treatments, and neither he nor his wife could arrange the necessary transportation. Mrs. Davis is currently interfering with her husband's care at the dialysis facility. A conservatorship of the person is necessary to ensure the Mr. Davis' medical and personal needs are continuously met. The Public guardian asserts that a conservatorship of Mr. Davis' estate is necessary to prevent any possible misappropriation and to ensure that his income goes to pay for his care.</p> <p>Court Investigator JoAnn Morris' Report filed 12/5/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 12/4/14.</p> <p>Voting Rights affected need Minute Order.</p>
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Status Hearing Re: Filing of the Petition for Final Distribution

DOD: 02/24/2012		<p>KENNETH ROBERTS, was appointed Administrator with full IAEA and with bond set at \$20,000.00 on 10/18/2012.</p> <p>Proof of Bond was filed 2/22/2013 showing bond posted in the sum of \$20,000.00.</p> <p>Letters issued on 03/14/2013.</p> <p>Final Inventory and Appraisal filed on 10/15/2013 shows an estate valued at \$129,764.97.</p> <p>Minute Order of 10/18/2012 set this matter for hearing on 12/20/2013 for status of filing for final distribution.</p> <p>Minute Order dated 12/20/2013 [Judge Snauffer] states: No appearances. Matter continued to 1/2/2014. The Court orders Larry Donaldson to be personally present on <u>1/2/2014</u>.</p> <p>Former Status Conference Statement filed 03/04/2014 by Attorney Larry A. Donaldson states that the accounting for the estate has been partially prepared but is not completed yet. The Administrator and heirs have not yet decided whether to sale or transfer the real property in the estate. The house is the only asset left in the estate. The Administrator of the estate, Ken Roberts, has lent the estate more than \$9,000. Ken Roberts is serving as Administrator without compensation and waives all fees that would normally be paid to him. Attorney Donaldson also waives all fees that would normally be paid for his services. There are no other assets other than the real property to pay back to the money loaned to the estate. Attorney Donaldson will be out of the county from 03/04/2014 through 03/12/2014 and unavailable to complete the paperwork to finish the accounting. Attorney Donaldson anticipates that the accounting will be completed and the estate in a condition to close by April 30, 2014.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 10/21/2014: No appearances. The matter is continued to 12/16/2014. Attorney Larry Donaldson and Kenneth Roberts are ordered to be personally present on 12/16/2014. The Court orders that a status report be submitted before the next hearing.</p> <p>Minute Order dated 10/21/2014 was mailed to Attorney Donaldson and Kenneth Roberts on 10/24/2014.</p> <p>Minute Order of 07/16/2014: counsel requests a continuance.</p> <p>Minute Order of 06/04/2014 continued to 07/16/2014.</p> <p>Minute Order of 04/30/2014: Counsel advises the Court that he now has all the paperwork needed to file the required documents.</p> <p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 122013, 010214, 031314, 043014, 060414, 071614, 090214, 102114			
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FTB Notice			

Reviewed by: LV
Reviewed on: 12/10/2014
Updates:
Recommendation:
File 14 – Roberts

DOD: 12/19/12			MANUEL ROJAS , brother, was appointed as Administrator of the Estate with Full IAEA and without bond on 02/14/13. Letters of Administration were issued on 02/20/13.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 10/16/14</u> 1. Need First Account and/or Petition for Final Distribution <u>or</u> current written status report.
Cont. from 041814 071814, 101614			Order on Ex Parte Petition to Amend Petition for Probate filed 07/23/13 ordered that Manuel Rojas file a bond in the amount of \$315,000.00. Bond was later increased to \$400,000.00 by Ex Parte Order to Increase Bond filed 08/16/13. Bond was filed 08/26/13 and new Letters of Administration were issued to Manuel Rojas on 08/28/13. Administrator Manuel Rojas died on 12/08/13. Pat Hernandez , sister, was appointed as successor Administrator with bond in the amount of \$400,000.00 on 03/19/14. Bond was filed 03/25/14 and Letters of Administration were issued to Pat Hernandez on 03/25/14. Minute Order from hearing appointing Manuel Rojas as Administrator on 02/14/13 set this matter for status regarding filing of the First Account/Petition for Distribution. Status Conference Statement filed 12/11/14 states: The accounting of this estate was complicated by the death of the first administrator. His records were not easily obtainable from his records after his death. He paid bills with money orders instead of keeping a checkbook and did not keep all copies of the money orders. An accounting is now being compiled and it is planned to be filed within the next 30 days. A 60 day continuance is requested.	
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Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 09/28/2011	ESTELLA GARZA, RAQUEL G. NANEZ, & ROJELIA GARZA GONZALEZ , daughters, were appointed Executors with limited IAEA authority without bond on 05/27/2014.	NEEDS/PROBLEMS/COMMENTS:
		Minute Order of 10/21/2014: No appearances. The matter is continued to 12/16/2014. Attorney Henry Nunez is ordered to be personally present on 12/16/2014 with his clients. The Courts that a Status Report be submitted before the next hearing.
Cont. from 102114	Letters issued on 10/03/2014.	Minute Order mailed to Attorney Henry D. Nunez on 10/23/2014.
Aff.Sub.Wit.		
Verified	Inventory and Appraisal Partial No. 1 filed 09/05/2014 shows an estate valued at \$250,000.00.	1. Inventory and Appraisal Partial No. 1 filed 09/05/2014 does not include the date of death of the decedent.
Inventory		
PTC		2. Need Final Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Not.Cred.	Minute Order of 05/27/2014 set this matter for hearing for the filing of the Inventory and Appraisal.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.	Declaration of Attorney Alaina N. Ybarra Re: Order to Show Cause filed 12/11/2014 states due to an inadvertence, Attorney Ybarra's office mistakenly viewed the date of the status hearing at 10/27/2014 rather than 10/21/2014. As a result of the calendaring mistake, she did not attend the Probate Status Hearing on the appropriately scheduled date and apologizes to the court for the error. As such, Attorney Ybarra is now requesting that the court forgive the calendaring mistake and that sanctions not be imposed on the next scheduled hearing date, 12/16/2014. Both counsel and the administrators of the estate have been working diligently to administer the property of the estate and have obtained and filed an Inventory and Appraisal of the real property of the estate and have even obtained a buyer for the real property located in Parlier, Ca. in Fresno County. Currently, the administrators are attempting to obtain an Order Confirming the Sale of the Real Property.	
Sp.Ntc.		
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Status Rpt		Reviewed by: LV
UCCJEA		Reviewed on: 12/10/2014
Citation		Updates: 12/12/2014
FTB Notice		Recommendation:
		File 16 – Garza

Atty Nunez, Henry D. (for Estella Garza, Raquel G. Nanez & Rojelia Garza Gonzalez – Executors - Petitioners)

Report of Sale and Petition for Order

Confirming Sale of Real Property (Prob. C. 2540, 10308)

DOD: 09/28/2011		ESTELLA GARZA, RAQUEL G. NANEZ, and ROJELIA GARZA GONZALEZ, are petitioners. Sale price - \$100,000.00 Overbid - \$105,000.00 Reappraisal - Need Property - 13620 E. Cypress Ave Parlier, Ca. 93648 Publication - The Business Journal Buyers - Rolando Villareal and Alicia Yvette Rojas, husband and wife, joint tenants. Broker - \$3,000.00 (3% - payable to Guarantee Real Estate)	NEEDS/PROBLEMS/COMMENTS: 1. Petition does not address how the proceeds of the sale are going to be handled. Will bond be set or will the proceeds be placed into a blocked account? 2. Need Reappraisal pursuant to Probate Code §10309		
Cont. from					
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			Reviewed by: LV		
			Reviewed on: 12/10/2014		
			Updates:		
		Recommendation:			
		File			

Age: 18		PUBLIC GUARDIAN , was appointed Guardian of the Estate on 03/26/14. Letters of Guardianship were issued on 03/26/14.	NEEDS/PROBLEMS/COMMENTS:
		Minute Order from hearing on 03/26/14 set this matter for a status hearing on 07/28/14.	<u>OFF CALENDAR</u> First and Final Account and Report of Guardian filed 12/11/14 and set for hearing on 01/26/15
Cont. from 072814		Status Report Re: Guardianship filed 07/10/14 by the Public Guardian, states: The Public Guardian has received a one-time lump sum payment in the amount of \$20,242.05 from the Defense Finance and Accounting Service, covering the period from 04/15/13 – 03/31/14. In addition, the Public Guardian received a lump sum payment in the amount of \$5,763.80 from the Survivor's Benefits Plan (SBP). These are funds from her deceased father's SBP, which is an annuity. Her monthly reapportioned annuity amount is \$1,941.00 with \$175.77 set aside for federal taxes, thus netting \$1,765.23. The minor also receives a monthly amount of \$520.70 dependency indemnity compensation from the Veterans Administration, which stops on her 18 th birthday. Further, it appears that the minor receives Social Security, which is currently being used to pay her Child Protective Service (CPS) care. The amount she receives is not known because it is paid directly to CPS. As of 06/27/14, the amount in the minor's Public Guardian trust account is \$29,672.21. The Public Guardian sends the minor \$300.00 per month for personal needs. In addition, Kassandra has been awarded the Fry Scholarship, which is part of the post 911 GI Bill given only to qualified children of servicepersons that died while on active duty. The amounts of the post 18 th birthday remuneration are unclear and Deputy Harper has called, but has been informed that a signed release is needed from the minor before any info can be released. The guardianship will terminate by operation of law on the minor's 18 th birthday on 10/16/14. Therefore, it is requested another status hearing not be set before December 16, 2014 to allow the Public Guardian time to prepare and file her final account for the guardianship.	
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Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: JF

Reviewed on: 12/09/14

Updates: 12/12/14

Recommendation:

File 17 - Higgins

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 09/26/13		LIANA M. WAITE , daughter, was appointed as Administrator with Will Annexed on 07/15/14. Letters were issued on 07/17/14.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory & Appraisal.
Cont. from		Minute Order from hearing on 07/15/14 set this matter for status regarding filing the Inventory & Appraisal.	
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			Reviewed by: JF
			Reviewed on: 12/10/14
			Updates:
			Recommendation:
			File 18 - Sena

Ex Parte Petition for Withdrawal of Funds From Blocked Account

Age: 18 years		MICHELLE SULLIVAN, mother/guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner requests withdrawal of funds from the blocked account in the amount of \$30,000.00. The purpose stated is for "vehicle, insurance. Needed for transportation to school. Parent's only income is Social Security."	1. The Petition was filed ex parte. Order dated 11/24/14 set the matter for hearing and required notice to the former minor Destiny Rose Sullivan no later than 10 days prior to the hearing. Therefore: a. Need Notice of Hearing. b. Need proof of service of the Notice of Hearing on Destiny Rose Sullivan. – <i>proof of service filed on 12/5/14 shows service of the petition and order requiring notice being personally served on Destiny however it does not show that she was served with the Notice of Hearing.</i>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	Petition request the court order the financial institution release the funds to Destiny Sullivan and Michelle Sullivan.	2. Judith Wright is the attorney of record. This petition was filed by the Guardian in pro per. Need substitution of attorney.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	The current balance on the blocked account is \$52,240.25.	3. The minor is now 18 therefore it appears that the funds should be distributed directly to her and not to her and the guardian.
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		Note: Once the minor reaches the age of majority the guardianship terminates. California Rules of Court 7.1004 states upon the termination of a guardianship by operation of law the guardian must file, and obtain the court's approval, a final account or report of the administration. Therefore a status hearing will be set on: February 18, 2015 at 9:00 a.m. in Dept. 303 for the filing of the final account or report of the guardian.
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<input type="checkbox"/>	UCCJEA		
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			Reviewed by: KT
			Reviewed on: 12/10/14
			Updates:
			Recommendation:
			File 19 - Sullivan

Ex Parte Petition for Withdrawal of Funds From Blocked Account

Age: 17 years Cont. from <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;"></td> <td style="width: 80%;">Aff.Sub.Wit.</td> <td style="width: 10%;"></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td></td> <td>Notice of Hrg</td> <td style="text-align: center;">X</td> </tr> <tr> <td></td> <td>Aff.Mail</td> <td style="text-align: center;">X</td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td></td> <td>Letters</td> <td></td> </tr> <tr> <td></td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>		Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.			Notice of Hrg	X		Aff.Mail	X		Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen			Letters			Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation			FTB Notice		<p>MICHELLE SULLIVAN, mother/guardian, is petitioner.</p> <p>Petitioner requests withdrawal of funds from the blocked account in the amount of \$25,000.00. The purpose stated is for "vehicle, insurance, insurance. Needed for minor to attend school. Parent's only income is Social Security."</p> <p>Petition request the court order the financial institution release the funds to Destiny Sullivan and Michelle Sullivan.</p> <p>The current balance on the blocked account is \$52,240.25.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>4. The Petition was filed ex parte. Order dated 11/24/14 set the matter for hearing and required notice to the former minor Tiffany Maria Sullivan no later than 10 days prior to the hearing. Therefore:</p> <p style="margin-left: 20px;">c. Need Notice of Hearing.</p> <p style="margin-left: 20px;">d. Need proof of service of the Notice of Hearing on Tiffany Maria Sullivan - <i>proof of service filed on 12/5/14 shows service of the petition and order requiring notice being personally served on Tiffany however it does not show that she was served with the Notice of Hearing.</i></p> <p>5. Judith Wright is the attorney of record. This petition was filed by the Guardian in pro per. Need substitution of attorney.</p> <p>6. Court may require more information about the vehicle the guardian wishes to purchase.</p> <p style="margin-left: 20px;">a. What type of vehicle will be purchased?</p> <p style="margin-left: 20px;">b. What is the purchase price?</p> <p style="margin-left: 20px;">c. How much will the insurance be?</p> <p style="margin-left: 20px;">d. Who will be driving the vehicle?</p> <p style="margin-left: 20px;">e. How will title on the vehicle be held?</p> <p>7. Court may require more information about the computer the guardian wishes to purchase.</p> <p style="margin-left: 20px;">a. What type of computer will be purchased?</p> <p style="margin-left: 20px;">b. What is the purchase price?</p> <p>Please see additional page</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Reviewed by: KT</td> </tr> <tr> <td>Reviewed on: 12/10/14</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 20 - Sullivan</td> </tr> </table>	Reviewed by: KT	Reviewed on: 12/10/14	Updates:	Recommendation:	File 20 - Sullivan
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Note: Once the minor reaches the age of majority the guardianship terminates. California Rules of Court 7.1004 states upon the termination of a guardianship by operation of law the guardian must file, and obtain the court's approval, a final account or report of the administration. **Therefore a status hearing will be set on:**

October 21, 2015 at 9:00 a.m. in Dept. 303 for the filing of the final account or report of the guardian.

Age: 15 years		<p>GRACE HERNANDEZ, guardian, is petitioner.</p> <p>GRACE HERNANDEZ, maternal grandmother, was appointed guardian on 11/23/11.</p> <p>Father: UNKNOWN</p> <p>Mother: OLIVIA TORRES</p> <p>Paternal grandparents: Unknown Maternal grandfather: Deceased.</p> <p>Petitioner states the child does not obey petitioner and staff at school. His behavior is causing problems in the household as well as at school. The child often leaves the house in the middle of the night and petitioner is unable to locate him for days at a time.</p> <p>Court Investigator Jennifer Young's Report filed on 12/9/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Proof of service of the Notice of Hearing is incomplete at #6 – the name, address and telephone number of the person serving the notice. In addition it appears that the signature is that of Petitioner. A party to the action cannot complete the service of the documents. 2. Need proof of service of the Notice of Hearing or a Declaration of Due Diligence on Ricardo Arreola, Jr. (minor)
Cont. from			
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		File 21 - Arreola	

Atty Ryan, Anna L. (pro per – maternal grandmother/Petitioner)

Atty Ruby, Curtis (pro per – father/objector)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 5 years		<u>NO TEMPORARY IN PLACE; TEMPORARY DENIED ON 10/28/14</u>		NEEDS/PROBLEMS/ COMMENTS:	
		ANNA L. RYAN, maternal grandmother, is petitioner.		1. Need Notice of Hearing.	
		Father: CURTIS W. RUBY			
Cont. from		Mother: CHRISTAL RUBY		2. Need proof of service of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person at least 15 days before the hearing or Declaration of Due Diligence or Consent & Waiver of Notice for:	
Aff.Sub.Wit.		Paternal grandfather: STEVEN RUBY			
✓	Verified	Paternal grandmother: TAMMY EWALD – served by mail on 11/23/14 with Notice of Hearing only		a. Curtis W. Ruby (father) – personal service required	
	Inventory	Maternal grandfather: PATRICK RYAN – served by mail on 11/23/14 with Notice of Hearing only			
	PTC	Petitioner states the court is fully aware of the history of the parents' neglect and the child's need for a guardian. After giving the parents another chance to rectify the circumstances, the need to remove the child from their care remains desperate. The parents are unstable and habitual substance abusers. In May 2014 the parents violated a restraining order when the father and paternal grandfather moved back into the mother's home. Petitioner states she has guardianship of the mother's other child, Mysteya (appointed in San Bernardino County).		b. Christal Ruby (mother) – personal service required	
	Not.Cred.				
✓	Notice of Hrg	Objection to Guardianship filed 11/24/14 by Curtis Ruby (father) states: Petitioner is a virtual stranger to the minor and it is in his best interest that he stays with his immediate family. Also objector alleges that the guardian abuses prescription medications.		c. Steven Ruby (paternal grandfather) – service by mail sufficient	
✓	Aff.Mail				
	Aff.Pub.	Court Investigator Jennifer Daniel filed a report on 12/09/14.		d. Tammy Ewald (paternal grandmother) – service by mail sufficient	
	Sp.Ntc.				
	Pers.Serv.	x	Reviewed by: JF		
✓	Conf. Screen				
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✓	Duties/Supp				
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✓	Order		File 22 - Ruby		
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	Citation				
	FTB Notice				

24A Leah Michelle Sanders (GUARD/P)

Case No. 14CEPR00952

Atty Kerr, Rebecca (Pro Per – Petitioner – Maternal Aunt)
 Atty Brewer, Ronnie T. (Pro Per – Competing Co- Petitioner)
 Atty Sanders, Margaret (Pro Per – Competing Co-Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10		<p><u>No Temporary Orders in Place as to Petitioner Rebecca Kerr –see note</u></p> <p>REBECCA KERR, maternal aunt, is petitioner.</p> <p>Father: JIMMY LEE SANDERS, Deceased</p> <p>Mother: LAURA KERR, Deceased</p> <p>Paternal Grandfather: James Sanders, served by mail on 11/26/2014</p> <p>Paternal Grandmother: Margaret Sanders, served by mail on 11/26/2014</p> <p>Maternal Grandfather: Ralph Kerr - Consents and waives notice</p> <p>Maternal Grandmother: Brenda Little - Consents and waives notice</p> <p>Petitioner states: The minor child needs the petitioner to be appointed as her guardian as petitioner is blood related. Petitioner has been in the child's life since she was born. Ronnie T. Brewer was the ex-boyfriend of the mother, he is not related to the child. Petitioner alleges that Ronnie T. Brewer is an alcoholic and severe cocaine addict and has severe gambling problems. She also states that he was physically and verbally abusive toward the mother and he left her before she passed away. Petitioner alleges that the house is not safe and has mold everywhere and the child has been sick due to the mold. Petitioner believes that her sister, the child's mother, would not want Ronnie T. Brewer to have custody of the child.</p> <p><u>Please see additional page</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>24 B is the Competing Petition filed by Ronnie T. Brewer, step-father, and Margaret Sanders, paternal grandmother.</p> <p>Note: Temporary orders were issued to Ronnie Brewer and Margaret Sanders, competing petitioners, without prejudice to preserve the status quo.</p> <p>Minute Order of 11/05/2014: The Court orders that Ms. Kerr is allowed to see the minor every Saturday from 10am-2pm beginning 11/08/2014, with the hours on 11/08/2014 being from 12:30 to 4:30 due to a previously planned activity. Furthermore, parties may mutually agree to a different four hour time block on said Saturdays.</p>	
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		<p>Reviewed by: LV</p> <p>Reviewed on: 12/12/2014</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 24D - Sanders</p>		

24A

24A Leah Michelle Sanders (GUARD/P) Case No. 14CEPR00952

Petitioner Rebecca Kerr filed a Declaration on 11-4-14 that contains an extensive timeline of the minor's living and care situation and series of events after her mother's death. Petitioner states Competing Petitioner Ronnie Brewer is a gambler and a car salesman and has a way to manipulate everything to go in his favor. Petitioner asks the Court to please do the right thing and keep Leah with her family. Please do not put her life in the hands of a known sociopath. Petitioner will provide Leah with a safe, stable, loving home, and keep her life as close to normal as it can be.

Attached to the Declaration is a letter from family friends Andrea Grate and David Jameson.

Separately, the maternal grandparents Ralph Kerr and Brenda Little and a maternal aunt Jennifer Lopez filed objections to Mr. Brewer's petition. Please see Page B.

Declaration filed by Rebecca Kerr 11/26/2014 includes a schedule for the month of November 2014 for the children by the father. Also included is a text message conversation between Brenda Little and Margaret Sanders.

Court Investigator Charlotte Bien's report filed 12/08/2014.

Atty Kerr, Rebecca (Pro Per – Competing Petitioner – Maternal Aunt)

Atty Brewer, Ronnie T. (Pro Per – Co- Petitioner- Step-Father)

Atty Sanders, Margaret (Pro Per – Co-Petitioner – Paternal Grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10		<p>Temporary Orders issued to preserve the Status Quo, expire 12/16/2014</p> <p>RONNIE T. BREWER, step-father, and MARGARET SANDERS, paternal grandmother, are petitioners.</p> <p>Father: JIMMY LEE SANDERS, Deceased</p> <p>Mother: LAURA KERR, Deceased</p> <p>Paternal Grandfather: James Sanders, served by mail 10/24/2014</p> <p>Paternal Grandmother: Margaret Sanders</p> <p>Maternal Grandfather: Ralph Kerr, served by mail on 10/24/2014</p> <p>Maternal Grandmother: Brenda Little, served by mail on 10/24/2014</p> <p>Petitioners state both parents are deceased and more recently the mother passed away on 09/29/2014. The child knows the petitioner as her father. The paternal grandmother lives close and also cares for the children and assists with the guardianship duties. Petitioner's request immediate assistance in the appointment of the guardianship to continue the child's maintenance and needs.</p> <p>UCCJEA indicates that the minor child has been residing with the proposed guardian, Ronnie T. Brewer, since 2010.</p> <p>Objections filed by Maternal Grandfather Ralph Kerr state Ronnie Brewer is not Leah's father and has no relation to her. In the past he has been mentally and verbally abusive to the mother, Laura Kerr. Mr. Kerr does not feel Leah will be in a safe environment if placed with him. Leah needs to be with her family, not her mother's ex-boyfriend. Mr. Kerr states he knows Mr. Brewer has abused drugs in the past. He also does not feel Ms. Humphrey-Sanders is capable of raising Leah. He states she is on several pain medications. Leah will get the best care from Petitioner Rebecca Kerr. Rebecca has a loving, caring, stable home.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>24A is the Competing Petition filed by Rebecca Kerr, maternal aunt.</p> <p>Minute Order of 11/05/2014: The Court orders that Ms. Kerr is allowed to see the minor every Saturday from 10am-2pm beginning 11/08/2014, with the hours on 11/08/2014 being from 12:30 to 4:30 due to a previously planned activity. Furthermore, parties may mutually agree to a different four hour time block on said Saturdays. Temporary orders issue to Ronnie Brewer and Margaret Sanders without prejudice to preserve the status quo.</p>	
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	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			n/a
	Conf. Screen			
	Letters			
✓	Duties/Supp			
✓	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: LV
Reviewed on: 12/12/2014
Updates:
Recommendation:
File 24E – Sanders

Objections filed by Maternal Grandmother Brenda Little state she has lived in the home with Leah for the past 3½ years and has witnessed Ronnie's extreme lack of parenting skills. He was never home to take care of Leah, her sister Morgan, and his daughter Riley. Ms. Little states her concern is that this pattern will continue. Right now, Leah is never home until 8 or 9pm. Ms. Little has been asked to move out of the home so there will be no one there to give her the love and stability she needs. She will be moving into Rebecca's home and will be there with her every day. Rebecca is a good mother and a loving, caring person. She is the best choice to raise Leah. See additional letter attached also.

Objections filed by Maternal Aunt Jennifer Lopez state Ronnie and Margaret are not the best choice for guardianship of Leah. Due to Ronnie's lifestyle, he is not home to take care of her the way her mother did. She deserves a stable, reliable, responsible guardian. She has lost both parents in four years. Ronnie did live with Leah the past few years, but he was not the "father figure" or the "stepdad" he is now claiming to be. Leah remembers her dad and his memory needs to live on for her. Ms. Lopez states she spoke with her sister many times and was aware of the situation going on in the home and was witness to Ronnie's abuse. Ms. Lopez feels Rebecca Kerr is the better choice to care for Leah.

Court Investigator Charlotte Bien's report filed 12/08/2014.

Petition to Establish Fact, Date, and Place of Marriage

		STEPHANIE KAY OLSEN and BRIAN LEE COOPER are petitioners.	NEEDS/PROBLEMS/COMMENTS: 1. Attached to the Petition is Marriage Register showing the solemnization of the marriage of Brian Lee Cooper and Stephanie Kay Olsen. This appears to be the official marriage record. Pursuant to H&S 103450, the purpose of obtaining an order establishing fact of marriage is to obtain a certificate to replace one which was never registered or to obtain a certified copy of the registration when the original records were lost or destroyed. Therefore since there appears to already be an official record of the marriage this procedure cannot be used. 2. Declaration in Support of Petition is blank at #4 stating the facts showing when and where the parties were married and explaining how the declarant has personal knowledge of those facts.
		Petitioners request the court establish the fact, date and place of their marriage on October 15, 2014 in Jamaica, Hanover Parrish.	
Cont. from		Petitioners state a certified copy of the official record of the marriage cannot be obtained because the marriage took place outside of the United States.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 12/10/14
			Updates:
			Recommendation:
			File 25 – Olson & Cooper

(1) Fourth Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney and for (3) Dispensation of Further Accounts

			PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Account period: 10/26/12 – 10/25/14	
Cont. from			Accounting - \$77,316.61	
	Aff.Sub.Wit.		Beginning POH - \$12,061.06	
✓	Verified		Ending POH - \$4,999.46	
	Inventory			
	PTC			
	Not.Cred.		Conservator - \$854.16 (2.96 Deputy hours @ \$96/hr and 7.5 Staff hours @ \$76/hr)	
✓	Notice of Hrg			
✓	Aff.Mail	w/	Attorney - \$1,250.00 (less than allowed per Local Rule)	
	Aff.Pub.			
	Sp.Ntc.		Bond fee - \$182.48 (o.k.)	
	Pers.Serv.			
	Conf. Screen		Petitioner states that the conservatorship estate now meets the conditions of Probate Code § 2628(b) to dispense with further accountings.	
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt		Petitioner prays for an Order:	
✓	CI Report		1. Approving, allowing and settling the fourth account.	
	2620	n/a	2. Authorizing the conservator and attorney fees and commissions.	
✓	Order		3. Payment of the bond fee.	
	Aff. Posting		4. Dispensing with further accounts.	
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice		Court Investigator Jennifer Young filed a report on 01/29/14. The report recommends that the conservatorship continue as is.	

Reviewed by: JF
Reviewed on: 12/10/14
Updates:
Recommendation:
File 26 - Barquet

Atty Kruthers, Heather H (for Petitioner Public Guardian)

Atty Bagdasarian, Gary (Court Appointed for Conservatee)

Petition for Appointment of Temporary Conservator of the Person and Estate

Age: 95 years		TEMPORARY EXPIRES ON 12/16/14	NEEDS/PROBLEMS/ COMMENTS:
		General Hearing 1/15/15	
Cont. from		PUBLIC GUARDIAN is petitioner and requests appointment as temporary conservator of the person and estate.	Court Investigator advised rights on 12/8/14.
	Aff.Sub.Wit.		
✓	Verified	Estimate value of the estate: Personal property - \$583,456.21	
	Inventory		
	PTC	Petitioner states Anna Young is a former girlfriend of Mr. Pirie's son (who is now deceased). He admits making her his agent under a Power of Attorney but no longer wants her to act. He consistently reports that she is stealing from him. The Clovis Police Department, Adult Protective Service, the owner of the care facility where Mr. Pirie resides and the Public Guardian all believe that Mr. Pirie is a victim of financial elder abuse and isolation as a result of Anna Young having authority as his attorney-in-fact. All believe that a conservatorship is necessary to ensure his safety, well-being, and protection of his assets.	
	Not.Cred.		
✓	Notice of Hrg	While the temporary petition was being prepared, County Counsel contacted attorney Gary Bagdasarian to ask him to consider meeting with Mr. Pirie, form an opinion of his mental capacity, and execute a new POS document if appropriate. MR. Bagdasarian like all others involved in this case, agreed that Mr. Pirie had capacity to execute a revocation of power of attorney. A copy of that document is attached to the petition.	
✓	Aff.Mail		
	Aff.Pub.	As part of the temporary petition, the Public Guardian requests the Court appoint Gary Bagdasarian as Mr. Pirie's attorney. Although the PG asserts that Mr. Pirie has capacity to hire Mr. Bagdasarian as his attorney, the PG believes it more appropriate to have the court appoint him as part of the conservatorship proceedings.	
	Sp.Ntc.		
✓	Pers.Serv.	W/	Reviewed by: KT
	Conf. Screen		
✓	Letters		Reviewed on: 12/11/14
	Duties/Supp		Updates:
	Objections		Recommendation:
	Video Receipt		File 27 – Pirie
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 1510)

Kimberly, 3	TEMPORARY GRANTED EX PARTE: EXPIRES 12/16/14		NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing for 12/16/14 hearing. 2. Unless diligence is found, need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian of the Person or Consent & Waiver of Notice for: a. Juan Vasquez (Linda's father) b. Kimberly's father
Linda, 2	GENERAL HEARING: 02/05/15		
	MARIA AVITIA PEREZ , maternal grandmother, is Petitioner.		
Cont. from	Father (Kimberly): UNKNOWN – Declaration of Due Diligence filed 12/11/14		
Aff.Sub.Wit.	Father (Linda): JUAN VASQUEZ – Declaration of Due Diligence filed 12/11/14 states that he was deported to Mexico and his current whereabouts are unknown		
✓ Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail			
Aff.Pub.	Mother: ROCIO GOMEZ – Consent & Waiver of Notice filed 12/11/14		
Sp.Ntc.			
Pers.Serv.	x	Paternal grandparents: UNKNOWN	
✓ Conf. Screen	Maternal grandfather: HECTOR GOMEZ		
Letters	x		
✓ Duties/Supp	Petitioner states that the mother on the streets abusing drugs. She has a warrant for her arrest stemming from arrests for stealing and possession of drugs. She is a danger to the children and has threatened to kill herself and the children in the past. Kimberly is afraid of her mother and refuses to go with her. Petitioner states that temporary guardianship is necessary because the mother is threatening to take the girls.		
Objections			
Video Receipt			
CI Report			
9202			
Order	x		
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 12/10/14
			Updates: 12/11/14
			Recommendation:
			File 28 – Avita & Gomez

Atty Ramirez, Jose Luis (pro per – maternal grandfather/Petitioner)

Atty Ramirez, Delia (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Jose, 15	GENERAL HEARING: 02/05/15		NEEDS/PROBLEMS/COMMENTS:
Jennifer, 13	JOSE LUIS RAMIREZ and DELIA RAMIREZ, maternal grandparents, are Petitioners.		
	Father: MARVIN FRANCISCO VILLALOBOS – Personally served on 12/11/14		
Cont. from	Mother: NATALY VILLALOBOS – Consent & Waiver of Notice filed 12/12/14		
Aff.Sub.Wit.		Paternal grandfather: UNKNOWN	
Verified		Paternal grandmother: VILM VILLALOBOS	
✓ Inventory		Petitioners allege that the mother is a drug addict and unable to care for her children. Petitioners state that temporary guardianship is needed in order to seek medical treatment for the children.	
PTC			
Not.Cred.			
✓ Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	w/		
✓ Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
✓ UCCJEA			
Citation			
FTB Notice			
Reviewed by: JF			
Reviewed on: 12/10/14			
Updates: 12/12/14			
Recommendation:			
File 29 - Villalobos			

1 Richard Michael Noroyan (Estate)
 Atty Keeler, William J. (for Ian Mitchinson – Friend – Petitioner)
 Atty Shafer, Claudia Y. (of Murphys, CA for Hugo Noroyan – Father/Contestant)
 Atty Motsenbocker, Gary L. (for Patricia English – Mother/Contestant)
 Atty Kruthers, Heather H. (for Public Administrator – Administrator)

Case No. 13CEPR00542

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

		The Fresno County Public Administrator was appointed as the personal representative of the estate on 8-19-13. At the hearing on 8-19-13, the Court set this status hearing for the filing of the first account or petition for final distribution.	NEEDS/PROBLEMS/COMMENTS: This matter is set at 8:30 am. <u>Minute Order 11-10-14:</u> Master Calendar does not have a courtroom available. Continued to 12-16-14 at 8:30 am in Dept. 303. <u>Note:</u> Pursuant to Order filed 9-29-14, the Court authorized release of the Decedent's original will for forensic examination in connection with the trial. It does not appear that the original document has been returned to the Court's custody.
Cont. form 101714, 111014			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 12-11-14
			Updates:
			Recommendation:
			File 1 - Noroyan